

WYLD TECHNOTE 91:Long Overdue processing

These instructions will help you create the "Long Overdue" template, you will need to answer these questions:

- specify what period of "overdue" you consider "long overdue", such as 90 days
- create (Y/N) a LONGOVRDUE bill and a value to use if the item does not contain a price
- create (Y/N) a separate PROCESSLOD bill and decide what that value will be within the report
- create (Y/N) an OVERDUE bill and accumulate any overdue charges due on the item
- mark (Y/N) the patrons record as BARRED

Find the Process Long Overdue Items report in the Circulation Group of reports. Open the template and give it a unique name. Click the "Selection Criteria" tab and enter your answer to the "longoverdue period" in the "Charge selection/Date due" field. You will notice that your library is selected under the "Item selection/Library" field, this is so you do not process another library's items that you have charged to a patron at your library. If you wish to process this report only against certain users you can select the appropriate profiles under "User Selection/Profile"

Now go to the "Value modification" tab and select the location you will have these items moved to. The default location is LONGOVRDUE, but if you are planning on removing these items from the collection you can skip a few extra processing steps by entering DISCARD.

To complete the report select the "Output options" tab and enter the answers to the other questions from above.

The screenshot shows the 'Long Overdue Option' tab of a report configuration interface. The tab is highlighted in grey. Below the tab, there are several options and input fields:

- Bill for replacement cost of long overdue item
 - Bill reason for replacement cost billing: LONGOVRDUE (dropdown menu)
 - Default value to bill if item has no price: 0.00 (text input)
 - Processing fee for long overdue item: 0.00 (text input)
 - Bill reason for processing fee: PROCESSLOD (dropdown menu)
- Bill for accrued fine on long overdue item
 - Multiple parts override for DISCHARGE ITEM: (text input)
- Change patron's circulation status to BARRED

When you schedule this template to run it will find any items that fit the long overdue criteria (except items with copy level holds), discharge them from the patron, and create for each item an extended info entry called LOST ITEM in the patrons record that includes the title, author, call number, copy number, barcode, and due date. It changes the current location of each item to LONGOVRDUE or whatever location you enter in the template under "New location".

Once this report is run if you create bills you will want to run the "Bill notice" report which will create an entry on the bill notice for each bill created in the above process. This "Bill notice" report will find ALL bills created for any of your patrons where a notice has not already been created. So for this reason you have to be a little careful about how you create the template and when you run it. Also, the bills that are created for LONGOVRDUE and PROCESSLOD are not associated with the item, so on the bill notice there will not be specific title information associated with the bill.

In general the bill notice will look like this

WYLD test library
2301 Capitol
Cheyenne, WY
82002

MARC TESTER STRATTON

Dear MARC TESTER STRATTON,
"FIRST BILL"

we are taking the liberty of calling your attention to the fact that you owe the Library some money for the following bill. Please pay this bill at your earliest convenience. Thank you.

1	date billed:1/3/2003	bill reason:PROCESSLOD	amount due:	\$5.00
2	Solaris 8 administrator's guide / Paul watters. watters, Paul A.			
	date billed:1/3/2003	bill reason:OVERDUE	amount due:	\$.10
3	Solaris 8 administrator's guide / Paul watters. watters, Paul A.			
	date billed:1/3/2003	bill reason:OVERDUE	amount due:	\$.10
4	date billed:1/3/2003	bill reason:LONGOVRDUE	amount due:	\$20.00
5	date billed:1/3/2003	bill reason:LONGOVRDUE	amount due:	\$20.00
6	date billed:1/3/2003	bill reason:PROCESSLOD	amount due:	\$5.00

TOTAL FINES/FEES AND UNPAID BILLS: \$50.20

This example has all three of the available bills you can create. There is no way to sort the bills so that the LONGOVRDUE and PROCESSLOD are listed with the OVERDUE bill for that item. Also if you do not charge overdue fines you will not get an OVREDUE bill (which is associated with an item and has title information).

If you do not charge overdue fines or if you do not answer Yes to the "Bill for accrued fine on longoverdue item" question your bill notice will look like this.:

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|          MARC TESTER STRATTON
Dear MARC TESTER STRATTON,
          "FIRST BILL"

We are taking the liberty of calling your attention to the fact
that you owe the Library some money for the following bill.
Please pay this bill at your earliest convenience.
Thank you.

1  date billed:1/3/2003      bill reason:PROCESSLOD   amount due:    $5.00
2  date billed:1/3/2003      bill reason:LONGOVRDUE   amount due:   $20.00
3  date billed:1/3/2003      bill reason:LONGOVRDUE   amount due:   $20.00
4  date billed:1/3/2003      bill reason:PROCESSLOD   amount due:    $5.00

=====
                                TOTAL FINES/FEES AND UNPAID BILLS:    $50.00
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QA

Q: What happens when the item comes back?

A: Since the item is no longer checked out to the patron you will get an "Item not charged" message.

Q: If the item comes back will I be able to circulate it to another patron?

A: Yes, even though the items current location was changed to "LONGOVRDUE" it can be charged, when you dischard the item its current location will change back to its home location.

Q: When the item comes back will the LONGOVRDUE and PROCESSLOD bills be forgiven automatically.

A: No, you must deal with these manually.

Q: Why are the LONGOVRDUE and PROCESSLOD bills not associated with an item?

A: SIRSI created the Long overdue process based on the perception that if you no longer have the item you will want to be removing it from the system (there is another report that does this very step.) Remember you cannot remove any item that has a bill record associated with it, so to make the process move smoothly they chose to design the program so these two bill reasons are not associated with an item thus facilitating the removal process.

Please contact Marc Stratton [mstratton@will.state.wy.us] in the WYLD office with any questions.